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ABSTRACT

Compiled for newly installed library trustees and commissioners in the state of California, this publication provides guidelines designed to assist new board members in learning their jobs. Chapters discuss the nature of public library boards in California, board duties and responsibilities, board operations, special challenges for board members, and library contexts outside of the individual public library. (FM)

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PUBLIC LIBRARY TRUSTEES AND COMMISSIONERS

TOOL KIT

Orientation Guidelines

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FOREWORD

What makes this publication by the California State Library different from other state library-published trustee manuals is that it is not a manual. It really is a TOOL KIT with a variety of informational materials for appointed and elected library trustees and commissioners. It's also a lively, good-humored essay which serves as an orientation on California public library boards, their background, structure, and activities--something we've not had in writing before on a statewide distribution basis. It recommends strongly each individual board write its own manual designed to its own community needs. As a TOOL KIT it provides a useful introduction to boards for the public-minded citizen who generously shares his or her talents and expertise with governing agencies for the benefit of the local community and its library service management.

What we like about the TOOL KIT is that it is basically written by and from the viewpoint of a Writers Team of Trustees. We expect and hope it will lead to regular updates and additional chapters in the not-too-distant future.

We enjoyed reading this, and believe you will too, an added bonus to its usefulness.

Special thanks and appreciation go to the trustees, boards, and librarians who patiently reviewed drafts and more drafts; to M. Virginia Hughes, who fitted the pieces together; to the State Library Development Services Bureau secretarial pool who typed and retyped; and especially to the innovative Writers Team of Trustees who traveled, studied, researched, discussed, designed, and wrote for the benefit of all of us.

Gary E. Strong

Gary E. Strong
California State Librarian
December, 1980

INTRODUCTION

When new trustees assume their position on a library board and look at the literature on trusteeship, their frequent and logical question is, "How does this affect me in California?" This booklet gives you a start in answering that question. The "TOOL KIT, Orientation Guidelines," has been assembled for your use by California library trustees, commissioners, and the California State Library.

It's been three years in the making, and is the product of experience and research by individual trustees, librarians, and entire boards of trustees. While it was being written, whole sections had to be rewritten to supply current information, for legislation changed, new library boards were formed, organization officers came and went, and funding patterns changed drastically. While board duties and responsibilities remain fairly constant, new directions and activities are currently being worked out by city and special district library boards, by county library advisory boards, and by the new system advisory boards.

The year 1981 is being regarded as a "field testing year" for the "TOOL KIT." We, as members of CALTAC, hope it will be well tested and then well evaluated by you, the users, for the benefit of board members yet to come. Use the Appendix, for example, the "Nuts and Bolts" section, for handy reference to names, addresses, telephone numbers, organization structure, acronymns, recommended readings, and pertinent legislation. What in the narrative needs expansion, revision, deletion? Let us know what you find of help, and what might be omitted or changed in the next edition.

It is the hope of the authors, the CALTAC Board, and the California State Library that the TOOL KIT will bring to its readers not only a greater awareness of the support and services provided for library boards and a challenging

reminder of board responsibilities and opportunities, but also a better understanding of how the library community throughout the state fits together. We hope the TOOL KIT will serve as a catalyst for better library operation and increased citizen involvement in libraries, and that it will be an organic and useful tool for the dedicated members of our library boards in California. With this document, we salute you and the job you are doing!

Cecily Cocco

Cecily Cocco
President, CALTAC, 1980
(California Association of
Library Trustees and Commissioners)

PUBLIC LIBRARY TRUSTEES AND COMMISSIONERS
TOOL KIT

Welcome, fellow trustee! Commissioner! Board member! You've just joined a select group, not restricted (we cover a wide range of occupations, education, drive, and such), but select. We care about libraries. If you're new around here, the following general remarks about trustees may be helpful. These are tools to do the job. If you're an old-timer (in terms of trusteeship, that is), they may refresh your memory as to what a trustee is all about. And if you're just browsing, you'll get your money's worth.

I. LEARNING YOUR NEW JOB

Let's begin with basics. Definitions. A library is a people-oriented service, usually based on a site--a room, a building, or a series of buildings--devoted to a collection of information materials, materials for the mind, and materials for the spirit. The definition has changed considerably over the centuries, particularly as to the type of materials that we keep. These have changed drastically since the first known library was founded in the 21st century, B.C. Babylonian clay tablets gave way to papyrus, which was superseded by parchment, that was replaced by paper. Today, we store and circulate records, films, video-cassettes, art works, and toys. Also books!

Library patrons expect, even demand, these items. The younger ones know them from schools where the library is either a "learning center" or an "information center," while parents often learn about new services from their children. Today's libraries are dynamic and have to be to keep up with the advances in communications.

Many of tommorrow's library users may never leave home for information, as future-generation computers, multicopiers, and electronic transmissions replace present methods of information storage and retrieval. And what a tool kit trustees are going to need then! In the meantime, we hope <u>this</u> introductory tool kit, as an orientation handbook, will be of interest, and of use.

II. WHERE DO YOU START?

A new library trustee is usually familiar with the library he or she will serve. So, you already have a good start in learning your role as trustee.

First thing, be sure you know whether your board is administrative or advisory. There's a big difference.

Next, know your library staff! The incumbent board and the chief librarian should invite new members to visit the library to meet the persons with whom they will be working. The visit should include a guided tour of the library, with sufficient time for information discussion and questions.

Do your homework! The resource list in this tool kit contains several general information titles that will do as starters. Most important, obtain and learn the laws which apply to your library. Determine whether you are a charter city with special library board stipulations, or if you operate under general law regulations.

Secure minutes of past board meetings to learn the kind of items with which the board deals. Learn how the library is financed. Study the way property taxes are allotted, or the other major ways of funding in your city, county, or special district. Get familiar with the library budget and the way it works.

Know your liabilities. Do you understand the Brown Act concerning secret meetings? Can you be sued by an irate patron? For malfeasance? For nonfeasance? You'll find the answers in this kit.

Attend board meetings; that's why you were appointed or elected. Listen! Relate what you hear to your homework. When the discussions begin to make sense to you, join in. You're going to have to vote on those items, so know what you're voting for. Or against.

Stay loose! So the Bee Gee's latest album circulates more than a Bach Partita! Or, there are more copies of Roots on the shelves than of the History of the Crusades. Could be that's where it's at. YOUR library is yours only in trust. It belongs to the many public(s), and you'd better know who they are, and what they are, and what they want in the way of services.

A trustees' manual and an orientation program for new trustees are essential in learning the job. Each board should produce its own manual which can include, but is not limited to: the enabling legislation establishing the board and its responsibilities; local board policies; relationships with other agencies and the public; specific duties of active board members; local library regulations, hours, services.

An orientation program for new board members should cover all of the items mentioned in this tool kit, plus others of local interest. Moreover, both the trustees' manual and orientation program should be reviewed regularly and updated by the board.

Later--after you have survived all the agonies of being the junior member on the team, have assumed your fair share of assignments and responsibilities, have attended "X" number of board meetings--in short, when your term is about to expire, you'll be fully qualified. Good enough in fact to serve another term.

Do it!

III. UNDERSTANDING CALIFORNIA PUBLIC LIBRARIES AND THEIR LIBRARY BOARDS

General Information

The basic level of library service to your community comes from the local city, county, or special district library. Currently, 168 public libraries with a combination of 2,911 headquarters, branches, stations, and bookmobile stops serve Californians.

Seventy-five percent of California's public libraries are advised or administered by library boards; of these 56 percent are advisory boards, and 44 percent administrative. Library board members are either appointed or elected, according to the legislation under which the library was established. The other 25 percent of public libraries in California are administered by a library director under the authority of the local governing agency.

Library boards use a wide variety of names in California: library boards of trustees, library commissions, regional councils (Los Angeles County uses these), library advisory committees, boards of library trustees, civic improvement commissions, and library and culture commissions. For simplicity's sake in the "Tool Kit," we shall use the term, "library board" to apply to all of the preceding names. Likewise, we'll use the term, "trustee," to include commissioners, board members, council members, and all similar titles. However, remember the title, "trustee," "commissioner," or whatever, doesn't mean the same thing in every place, so it's up to you to find out exactly what your job is in your situation. For this, you need to know your legislative authority.

Legislative Authority For Boards

In California, there is no state mandate for public libraries.[1] Public libraries exist under "permissive legislation," both state and local. This

[1] An excellent and very readable account of the establishment of public libraries: city, county, and special district, in California from 1878 to 1917, plus the legal basis of public library operation, is provided in Ray E. Held's The Rise of the Public Library in California. Chicago, American Library Association, 1973.

means each local governmental entity has had the option under state law, to establish, or not establish a public library, if citizen interest so demands.

State law takes precedence over municipal law, although there are occasional exceptions for charter cities and counties. As all California counties, cities, and special districts were created originally by state law, many of these operate today solely within guidelines set forth in state law. The remainder operate under local charter mandates. State legislation affecting libraries is chiefly contained in the State Education Code, and the State Government Code. Other state legislation especially significant for library boards today are the Meyers-Milias-Brown Act (employers and employees rights to meet and confer over wages, benefits, etc.); the Ralph M. Brown Act (open meetings); conflict of interest legislation.

All local public libraries are established under one of two types of legislative authority. The first type is "general law;" those state statutes which apply generally throughout the state. A "general law" city library, a "general law" county library, or a "general law" special district library, for example, are ones organized under provisions of the State Education or Government Code.

The second type of local public library is the library in a "charter city."[1] Under the State Constitution, cities may adopt a charter and operate under "home rule" regulations, rather than "general law" regulations. Charter cities are relatively few in number and those which contain specific provisions for library board procedures, fewer still.[2] The extent to which each charter's provisions differs from "general law" varies from one jurisdiction to the next,

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[1] Held, Ray E. Ibid. pp. 65-69. Excellent summary of charter differences in California libraries.

[2] Out of California's 426 cities (including the city and county of San Francisco), 87 have charters; and of these, 43 have libraries with library boards. From a draft paper by Cy Silver, Planning and Evaluation Officer, California State Library. 1980.

in accordance with perceived local needs at the time the charter was first written.[1] This applies similarly to provisions regarding library boards. Sometimes the charter or local ordinance pertaining to the library board simply repeats the organizational structure and duties set forth originally in "general law," modifies the "general law" slightly, or adds to it. It is usually the larger charter jurisdictions which include more complex and detailed stipulations for their library boards.

Counties also may adopt charters in regard to specific subjects authorized by the State Constitution. Twelve of California's 58 counties have done so, and of these, five charter counties have in addition established county library commissions. A number of "general law" counties also, of course, have established county library commissions, by ordinance, minute order, or resolution.

If you've come from the east coast, you may think of public libraries operating as separate entities of government; run by independently elected boards of trustees which can set local library tax rates independently, hire and fire library directors and staff, and generally behave as independently as cemetery boards have in the past in our state of California. However, in California, city, county, and special district libraries operate under specific state and local legislation which tie them specifically to state and local funding patterns, and to state and local regulations and operating procedures. So, if you are wondering why the library board of a neighboring city selects and employs its library director, while your board is expected to recommend candidates to the city personnel board, check the state and local legislative authority under which you operate.

The term of office for a trustee and number of board members are also established by state law, by local charter, or local ordinance. Local charters

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[1] Charters can be revised or changed, but generally this is a difficult procedure.

sometimes designate the number of terms a trustee may serve. Library boards may find that unlimited renewal of terms of office, although they build on experience, will preclude a necessary injection of fresh viewpoints and energetic new approaches to service. To assist in recruitment, the Maddy Local Appointive List Act of 1975 (California Government Code, Section 54970) requires unscheduled vacancies as well as pending board vacancies (both regulating and advisory boards) shall be published by all cities and counties to make available and take advantage of the diversity of citizen talent and experience available locally and untapped.

Today's public administration practices often require a limit of two consecutive three-year or four-year terms. They also often require an "open interview" procedure where interviews for prospective appointees are held at an open public hearing. Not only are such interviews held for library trustees, but for other city board and city councilmembers as well. "The public's business must be conducted in public," are key words of our era.

Local Library Funding[1]

Until passage of SB 90 in 1972, the local property tax was the base for most public library funding. SB 90 limited the total tax rate. It also tended to eliminate the separate library-tax rate, even though library funding was still tied to property taxes. In 1978, Proposition 13 reduced all taxes; it placed still a further cap on property tax rates, and consequently the total funds derived locally from them. Today, public libraries must compete with other local government units for the general fund monies (derived from these now drastically reduced property tax revenues, sales tax proceeds, other

[1] See Appendix (pp. 56-57), "1980 FUNDING FOR CALIFORNIA'S LIBRARIES," and "COMPARISON CHART--LOCAL, STATE, AND FEDERAL LIBRARY FUNDING" (p. 58).

limited local tax resources from the early bail-out funds, and now, augmentation funds), rather than depend upon the special "dedicated library tax" of earlier days. There is no assurance of equitable proportions of a city's or county's general fund among its agencies. Rather, competition with other city and county departments and special districts at budget time for general fund monies is the name for library funding today.

Using special provisions of Proposition 13, several city and county libraries have tried to get the required local voter approval of a special library tax levy. Such voter approval now requires a two-thirds vote. The first and only success to date (1980) has been achieved by the Berkeley Public Library.

Changing Board Structures and Functions

Some library boards have administrative (policy) control over the library program; others have advisory responsibility; and some may feel today with changing government operational procedures, they are somewhere in between. Trustees are finding that board concerns of library budgets, personnel, and buildings are generally an ongoing concern of city councils and boards of supervisors, as well as of the library board. A primary example of this, of course, is local civil service regulations which can cause a drastic adjustment of duties of an administrative board in this area.

Most California libraries today, whether they operate with or without library boards, are regarded as departments of local city or county government, rather than separate agencies in the community. This represents still another changing function for library boards: shared responsibilities. It means also that library administrators in a number of libraries are often required to work simultaneously with two bosses: an administrative board, plus city or county

officials--a city administrator, or county executive. This can be a difficult operation for both library board and library staff, and library boards and librarians need to be sensitive and understanding of the pressures on all when this occurs.

Also, trustees may find their library administrator, because of the local library service pattern, works with as many as six or eight local library boards at a time. An example of this is where boards represent a number of regions served by the same library, as in Los Angeles County. Another service pattern is where individual cities are united under the umbrella of a city or county's services, as in Riverside City with two boards, or Santa Clara County with eight. In such situations, one of these multiple library boards may be administrative in duties, and the others, advisory; or all of the boards may be advisory.

It's helpful to know if your city or county has issued operational guidelines for board members working with city or county departments. The "Boards and Commissions Handbook" issued by the City of Chula Vista, is an excellent example of such a guide, and useful to a library board member anywhere.

Whatever the title or establishment structure, today library boards represent formal citizen-user guidance to the local governing agency for public library service. Library boards exist to represent the people, to see that the community is served with quality and community relevant service, and to provide vital guidance to local government and library staff in management, planning, and evaluation functions.

An interesting action of a board reaching out effectively to the community is that of the Palos Verdes Library District Library Board. It includes three students on its board in addition to its regularly elected board members: each of the three local high schools selects one student as a nonvoting, ex-officio library board member. Each student serves one year.

IV. BOARD DUTIES AND RESPONSIBILITIES

Legal Requirements and Liabilities

Since public libraries differ categorically--city, county, special district--the duties of trustees differ also. There are however, duties specified in California law, whether general law, or charter, which are common to all.

Regular meetings. City library boards meet monthly, at times and places designated by themselves or by the local governing authority. Failure to meet may be termed as "nonfeasance," which translates as "omission of something that should have been done." Although this omission seems innocuous enough, it may result in a board being held legally liable if that no-show occasion causes some person physical or financial injury.

County library boards (advisory commissions) appointed by the county board of supervisors, meet regularly according to their individual bylaws which in turn, are approved by their local board of supervisors.

Elected special district library boards also meet regularly in accordance with the Education Code.

Public meetings. California law, specifically the Ralph M. Brown Act,[1] directs that the board meet publicly and that the public be informed of meeting time and place. The basic purpose of the act is to guarantee that all public business is conducted openly. This precludes a quorum of the board getting together privately, except in clearly defined situations when the board may meet in closed (formerly called executive) session. But, notice of such closed sessions must be made public and any decisions for action must be announced in a public meeting.

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[1] Recently modified by SB 1850, Keene, September 30, 1980. This is now Government Code, Chapter 1284, and goes into effect January 1, 1981.

Special meetings. These may be called at any time, following legal procedures described in general law or in charter specifications. Such a meeting must be publicized to assure conformance with the Brown Act.

Quorum. A simple majority of the board must be present before business may be transacted.

Officers. A president or chairperson (and president or chairperson pro tem) is selected by board members.

Records. Board proceedings must be recorded in some manner and maintained, hence the need for a secretary or clerk to take formal minutes.

Rules. The board writes bylaws covering board procedures. These may include methods of revising bylaws and regulations, composing agendas, and conducting meetings. Publishing these procedures and keeping them readily available makes them especially useful in orientation programs for new board members, and for the public who may come to watch the board in action.

Reports. State law requires a report from each public library to be submitted annually to the California State Library in its function as statewide clearinghouse for library information and its charge from the State Legislature to maintain comparative studies of library conditions in the state. Most charter regulations or local ordinances concerning library boards also require an annual report from the library board to the local governing authority.

Liabilities. The liabilities of California library trustees vary, depending on the kind of library--special district, county, municipal--and type of board--administrative or advisory. In the absence of specific requirements laid down by the local governing agency, library board responsibilities are outlined in the California Education Code, and trustees are liable for the consequences resulting from failure to obey those laws.

Trustees perform either ministerial or discretionary duties. A ministerial duty is one that is absolutely certain and imperative, as for example: meeting and acting as prescribed by law. A discretionary duty demands the exercises of reason and determining, with "discretion," whether or how to act. Deciding to erect or purchase a library building when it has not been provided by the governing agency would be a discretionary act, really far-out, but nevertheless discretionary.

Failure to act ministerially is a "nonfeasance," and the library board is liable if such failure injures any person or group. This makes knowledge of responsibilities essential. Know your own turf! Get a copy of the enabling legislation that established your board--ordinance, code, charter--and study it. You may be either pleasantly surprised or disillusioned. Remember, you have no authority that is not specifically granted and in some cases may have even less, due to changes in city or county personnel procedures and recent restrictions on taxing capabilities. Many times library responsibilities have been assumed by other government departments without formal procedures. If this has happened to your board, clarify your position through discussion, consensus, and most important, written internal guidelines.

Find out too, the extent of your liabilities. Check with your city or county legal advisor on this. Generally, liabilities cover a half-dozen or so areas ranging from nonfeasance (due to failure to act), or malfeasance (fiscal misappropriation). Other areas are: errors or mistakes in the exercise of authority; acting in excess of authority (censorship or dress codes); negligence (unsafe library conditions resulting in physical injury); and intentional tort (liabel or assault). Many libraries nationwide are investing in insurance policies for the protection of board members. Look into whether your city or county includes the library in a blanket insurance program and liability bond policy.

Particularly important is compliance with the public meeting law, the Brown Act. As stated earlier, this guarantees that all public entities conduct all business in public. Closed sessions may deal with three subjects only: national security (exceedingly rare in library circles); certain personnel matters; litigation. Action taken is reported out at the next meeting; or at the same meeting if the library board reconvenes to an open session. If in doubt, consult your library reference section for a current copy of the Brown Act or ask legal advice before going into closed session. Also, read "Secret Meeting Laws Applicable To Public Agencies," from the Office of the Attorney General (Appendix, p. 113). Under these laws, almost nothing is done under wraps.

Another important legal area trustees should inform themselves about is the conflict-of-interest provisions of the Political Reform Act of 1974, as amended. This Act is administered at the state level by the Fair Political Practices Commission. These provisions are designed to prevent a public official from making, participating in making, or using his official position to influence a governmental decision from which he would derive tangible personal gain.

Each local public agency is required to develop a conflict-of-interest code. County boards of supervisors adopt these codes for themselves, appropriate county employees, boards and commissions within the county, and any appropriate employees of these boards and commissions. City councils adopt codes for themselves, city boards and commissions, and their employees where appropriate.

Members of administrative library boards are obviously affected by the statute and administrative regulations pertaining to it. Advisory library

board members may be affected, depending upon the degree of influence which they exert on the decision-making process. Questions regarding this Act and the regulations should be referred to the county counsel, city attorney, or the staff of the Fair Political Practices Commission.

Beginning in 1981, individuals required to file financial disclosure statements under a conflict-of-interest code and who fail to do so on time will be fined $10 per day for each delinquent day. Trustees, check this new state regulation and how it relates to you individually.

In the absence of a legal opinion, the trustee whose status might be in doubt should not participate in the decision-making process, neither debating nor voting and with notation of such nonparticipation made in the minutes of the meeting.

So far, no board has been sued because a library book inspired some impressionable person to commit a crime. Recent criminal defenses have been based on undue influence attributed to TV programs, and one California librarian has been subpoenaed to testify about the reading habits of an accused criminal. It's hoped these incidents will not start a trend.

In the area of liability, best go by the Boy Scout route. Be prepared! Know your duties and responsibilities as well as your rights. After all, you volunteered to help keep a public trust.

Duties: Administrative Compared to Advisory

As you keep hearing, a library board may be either administrative or advisory in duties and function. This designation as "administrative" or "advisory" and the local responsibilities are spelled out in the enabling legislation which establishes the board. Potential trustees should understand what is expected of them and have a knowledge of their responsibilities and duties before accepting the trust.

In one of its publications, the International City Managers' Association used two criteria in distinguishing administrative boards from advisory boards: "(1) authority for appointing the librarian, and (2) authority for approving the library operating budget." Boards were designated as 'administrative' where the board appoints the librarian and submits the budget either to the mayor or city manager or directly to the city council. In other words, the library board itself handles the appointment of the librarian and the submission of the operating budget.

"Boards were designated 'advisory' where the mayor, city manager, or other chief administrator appointed the librarian and where the librarian himself submits the budget directly to the chief administrator or to the city council.

"Boards were designated as 'mixed' where only one criteria applied--that is, appointment of the head librarian or submission of the operating budget."[1]

The administrative library board is a governing body. This body has clout, the authority to determine fiscal, personnel, and administrative policies. The successful administrative board uses this authority judiciously, working with the library director in a team effort to fulfill the library needs of a changing community. Elected special district trustees, and a goodly number of city trustees, are administrative.

Advisory boards are just that. Advising. Suggesting. Recommending. Anticipating. Assisting in planning. Performing as a sounding board. Evaluating. They are the library liaison with community and government. Their assistance is essential to both library and governing agency. They are an invaluable independent resource to the library, not simply a rubber stamp for

[1] Bowler. Local Public Library Administration. pp. 90-91. Underscoring by CALTAC Writers Team.

the librarian or governing agency. Many city trustee boards, and all county library commissions (except two) are advisory.[1]

Originally, the differences between advisory and administrative library boards in California were great, but recently they have lessened somewhat. As more and more public employees (including library personnel) come under civil service regulations or collective bargaining and the separate local library tax has been impacted by current legislation, or Proposition 13, board functions regarding financing and personnel have changed. City councils approve budgets that are prepared by trustees or the library director or, for best results, by the two working together. In most cities, civil service regulations control library staffing policies, with trustees acting as personnel staff consultants. Today, administrative boards may advise as much or more than they administer.

County library commissioners, completely advisory in nature, furnish an important link between the county library and the governing county board of supervisors, as each member assumes the responsibility of reporting back regularly to his own supervisor on the services, needs, and achievements of the library program.

A vital function common to both advisory and administrative library boards is that of liaison between the library and the community, including every governing official, every local organization, and every individual resident--whether library user or not. This calls for special skills and knowledge!

Responsibilities and Duties

A recent library trustees' handbook summarizes the important responsibilities of trustees: "Library trustees have many responsibilities, but

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[1] See Appendix, pp. 60 and 62.

among them is not the day-to-day management of the library. Rather it is their responsibility to see that the library is well managed in a manner consistent with the law and with the policies that they have established. The duties of library trustees are few in number, but they are broad in scope. They require the ability to select a qualified librarian or library director, to develop sound policies, to assure adequate financing and money management, to be good public relation representatives, strong library advocates, and to plan and evaluate against established goals."[1] These five responsibilities listed are the broad, traditional duties of library boards: personnel; policies; library financing; public relations; planning; and evaluation. Add one more which is needed especially in today's changing world--continuing education for library board and staff.

Library Policies and Procedures

Major policy statements regarding subjects such as access to the borrowing records of patrons, or use of the community meeting room should be developed jointly by the library director and the board, and recorded in a local Trustees Manual. Every such policy manual should support the "Library Bill of Rights" and the "Freedom to Read" statement. And, as we keep recommending, every local public library in California with a library board should have its own Trustees Manual.

Generally, library operating procedures are considered an administrative responsibility of the director, while the development of policies, especially on sensitive matters, is a joint responsibility of the board with the advice of the director.

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[1] New York State Library Trustees' Handbook. Library Development, State Education Department, Albany, New York. 1980. p.6.

Library operating procedures should also be published. Most often these are a separate document: a "Library Procedures Manual," available to the public on request. It's easy enough to say, "Oh, anyone can check out books." But to whom? For how long? The director and library staff must develop methods or procedures for every step in the library's operation. Not only will a written statement answer an irate patron who demands to know why he can't check out more than three "in demand" items, it is invaluable in training new employees.

Written policies and procedures not only guide the daily performance of the library administration and its board, but are a positive influence on the public image of the library and the appropriation of funds for it.

Budgets

The library budget is usually prepared by the library director, with discussion and review both before and after preparation. This give-and-take process also serves to inform the trustee and prepares him to defend the budget, if need be, before the governing agency and those responsible for appropriating library funds. During budget discussions, the new trustee learns about his library at the most important level, the bottom line.

Remember, it is not the primary mission of the library board to see how many dollars can be cut from a budget. Rather, it should be its mission to determine what programs the library can best offer its community in the era of diminishing dollar resources, which are relevant for the community, wanted by the community, and which are cost-effective.

Seeking Additional Financing

As in almost every field, money makes the public library wheels go around. Since June 1978 and the passage of Proposition 13, finance has become the primary item in most library discussions.

Exploring other sources isn't easy for library trustees, who today must seek out special revenue methods. (See Appendix, p. 58, "Comparison Chart of Local, State, and Federal Library Funding.") Local sales taxes, bed taxes, even a "timber yield tax" have been tapped for library support when approved by the local governing agency. Charges for copiers, typewriters, auditorium use, film or projector loans, reserve notification, book rentals, fines or fees for overdue and lost books usually add only a pittance to a library's income and it is rarely that a library can recover its costs via such methods. If it is to continue as an educational institution, it must rely on broad-based public funding for its basic support.

Federal and state legislation have recognized the need for financial aid to libraries. One of the most important of these to California trustees is the California Library Services Act (CLSA), passed by the State Legislature in 1977. (This is described in Section VII, p. 43.) Revenue sharing is another important source of funding for many libraries.

Fees for basic library services, such as charges for library cards, have been proposed as ways to make public libraries self-supporting. Legalization of such fees, which are opposed by the California State Library, the California Library Association, the California Association of Library Trustees and Commissioners, and the California Library Services Board would violate the principle of free public library services to all citizens.[1] Where they have been instituted, experience so far shows that library use has dropped drastically.

Another avenue worth exploring is that of grants, available from government sources, foundations, and corporations. There are frequent training workshops available on writing grant applications, both locally and regionally in

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[1] See Attorney General's opinion on fees, Appendix, p. 165.

California. They are provided by private, governmental, or state organizations. The California State Library also, through its Library Development Services Bureau, offers consultant service and workshops upon request, on obtaining grants.

Public Relations

Among the trustee's most important functions is that of public relations for the library. You, as spokesperson for the library, are an important element of that program. You represent the library at all times, formally or informally. Varying backgrounds of board members lead to varying opinions. It may happen you will not always agree with board decisions, but in such an event, you do not act unilaterally. This is one of the most important dictums for a board member, and it is a basic premise of continued service on the board. You speak for the board, you support board positions, and remember always that in addition to your voice, it's the united voice of the board which has the powerful impact on the public and on local government.

It's the people in your community who pay the bills, and today they are very much aware of their ability to affect public agencies through their tax power. So the very best public relations start with seeing that your library responds to community needs, supplies a program relevant to community interests, and lets people know the services are there.

Publicity, quite a separate and different program from public relations, is a way to let people know about library services. It promotes a sense of public pride in the library, and motivation to use the library building and library programs through a variety of techniques: free public service announcements on radio or television, newspaper articles, and bold colorful library publications--brochures, flyers, booklists, as well as slide shows,

video cassettes, and such like. Letters to the hometown editor, especially from Friends and library users, carry a wallop because such letters are written so seldom about libraries. If you worry about publicity budget costs, remember good publications can result from as fundamental an item as a typewriter or duplicating machine in good condition, combined with imagination in selection of color and type of paper stock.

More important than any publicity activity is the attitude of every staff member from page to circulation desk clerk to library director to board member: to make visitors to the library feel welcome. That's public relations.

Continuing Education

"Continuing education" is a term in frequent use today, referring to formal or informal learning situations for library staff and board members. These opportunities are generally job-related, aimed at improving the abilities of all persons working in library services. Training programs are essential for library personnel, both professional and supportive staff, whether they are remaining within a position category or are preparing to move into a higher one.

They are invaluable as well for trustees, who recognize that they too have a responsibility to advance their expertise in carrying out their functions.

Conferences, workshops, and seminars in management, budgeting, and personnel issues are offered with increasing frequency by local jurisdictions and private trainers. Library-related training in automation, circulation systems, special services, grant-writing, and the like, are often available locally or regionally for library staffs, and can likewise enable trustees to keep up with the state of the art.

Your library's volunteers too, should be included in continuing education programs. Throughout the state today, special programs train volunteers to serve in community agencies, libraries included, responding to the new situation of living with Proposition 13. Trustees and library administrators should know about these programs and take advantage of them.

Your duties and responsibilities as a trustee include planning for, and budgeting for continuing education, opportunities for staff, board members and volunteers. Seize the opportunity to learn; regard every CLA meeting in California, and other conferences--local, regional, and even national--as educational growth occasions, for staff, and for yourself.

V. HOW THE LIBRARY BOARD WORKS

The public library trustee's relations with the governing agency, library administrator and staff, individuals, and community groups are vital. Although these relations vary from case to case, as in all human relationships, qualities of warmth, understanding, openness to differing points of view, flexibility, and adaptability are essential to success of the board member.

With Local Government

A trustee's legal relationship to government is spelled out in the library legislation which establishes the board. However, we recognize in management today there may frequently be conflicting laws and ordinances in regard to the duties and responsibilities of legislative and administrative officials. (Civil service regulations are one example.) It is not always possible, necessary, or even desirable for library boards to resolve these conflicts through law. Even though the library board may have the legal authority to use in administration of the library, it is usually more effective to work through negotiation and consultation. The confrontation method is not healthy in politics or government. A "modus operandi" with local government can often be established which can work well for the library and still allow the board to provide its counsel.

Trustees also have unstated political relationships with their governing agencies. These are a fascinating, highly variable blend of local custom, interests and concerns (and personalities) of elected officials, administrative officers, library directors, and trustees themselves. It is crucial to know key people in government agencies. They can be "best friends or best foes" to the library. The feeling of confidence on the part of local government that the library board is the best information resource on the library's behalf, is invaluable.

Trustees have a major advantage in both their legal and political relationships to government: since they serve without pay, trustees enjoy independence of approach. Thus, they, as public officials, can represent citizens to public officials with freedom. (The library director, who often serves in a line relationship to a manager or to elected officials, lacks this freedom of expression, as he is considered to have a vested interest.)

Relationships between trustees and government benefit when officials and managers are made aware of board and library activities through reports, personal contacts, or public information outlets on a regular basis. The impact of the board comes because it represents the community, and because it speaks with one voice. Here is where trustee teamwork is vital!

Questions sometimes arise as to when a spokesman for the trustees should appear before local officials, and whether the trustee chairman, a designated trustee, or the library director should speak. These matters are affected by local practice, individual preference, and perhaps by whether the trustee's duties are advisory or administrative. As a general rule, a library trustee speaks for the library board when appearing before local officials. This is because of the relative independence the trustee enjoys in the "political relationship" between the board and the governing agency. Most trustees who wish to address their officials in a public, formal manner do so simply by asking to be placed on the agenda for the officials' next meeting.

With the Community

Ordinarily, no one wants to be "caught in the middle," but that's the space the trustee occupies between library and community. He interprets and sells library services and policies and, in turn, channels community attitudes and needs of the community to the library.

This isn't easy! Communities are individuals and organizations with varying interests, attitudes, and needs, all of which or none of which may make conflicting demands on the library. If no group is demanding service, look for the reasons. The library mission is to serve the entire community, not just current library users.

Know the community--its demographic characteristics such as age, educational levels, ethnic backgrounds, income distribution, family size. Various agencies and community organizations prepare studies on such subjects. City or county planning departments, the U.S. Bureau of the Census, the League of Women Voters, Chamber of Commerce, a community clearinghouse or adult education center--all are sources of information. Use them! And see that your library has them available.

Learn the social structure--organizations and their officers, community leaders, sources of funding, political activists. Be aware of the power structure of your community; for example, who pays the most taxes, the officers of your local labor union, the most important bank, and the like.

Publicize library services, activities, and policies, formally and informally. Involve the community. Tap the creativity of individuals with different points of view for library programs. Be visible. Aim to make the library visible. Identify yourself with the library and be willing to answer questions about it.

With the Library Director

The relationship between trustee and the library director is highly complex. Traditionally, trustees have dealt almost exclusively with policies, library directors with administration. This division is less useful today, when we are coping with an era of changed expectations. Taxpayers are asking questions and may be critical of conventional ways of doing things. As the

International City Managers' Association text on libraries puts it, "The library board relies on the librarian's professional judgment just as the librarian is mindful of the board's sensitivity to community values. The librarian and the library board are interdependent, and mutual confidence and respect are mandatory for effective working relationships."[1]

Trustees and librarians must listen to citizen input and decide spending priorities together. This requires flexibility from both trustees and directors. The librarian should provide leadership and direction to the board. Exchange views regularly on the changing library scene, local, statewide, and nationally. The board should then raise questions! Suggest alternatives! Jointly determine purposes, priorities, and programs! Evaluate! The determination of which priorities to stress, in a time when funding for traditional programs, not just the new ones, may be in question, is the task of the library board and the library director, together.

This is a new active role, one with which long-time trustees and directors may be uncomfortable. But those who have confidence and trust in each other and who cooperate will move the library forward. So get your act together; they're booking groups on the library circuit these days.

With the Library Staff

Trustees' relations toward library staffs are open, cordial, supportive, appreciative, professional, and business-like. Trustees behave toward staff members as do Boards of Directors to members of their firm.

Professionally-oriented trustees observe the library's management structure scrupulously. All matters concerning management functions and day-to-day

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[1] Bowler, Roberta, editor. Local Public Library Administration. Chicago, International City Managers' Association, 1964. p. 92.

operation of the library are responsibilities of the library director and the supervisory staff.

Trustees also honor the channels of communication established within the library. For instance, when a staff member approaches a trustee with an idea for improving service (or a complaint), the trustee listens in a friendly, noncommittal fashion and encourages the staff member to present the idea via the library's accepted procedure--to the department head perhaps, or in a departmental staff meeting, or to the library administrator.

Successful trustees do not have favorites among the staff and they, themselves, neither expect nor accept special favors or consideration from staff members.

With the Friends of the Library

An especially significant relationship of boards of trustees is to the Friends of the Library. Friends! Who are they? What are they? Friends groups are active supporters of public libraries. They organize to raise funds, sponsor cultural and educational programs, publish news about the library, and speak strongly and effectively in support of the library before governing agencies and other community organizations. Friends are among the most important citizens groups in the library world. They enrich the library's services and help interpret the library and its programs to the community and vice-versa. Friends are "those who believe any community is a better place in which to live if it has a first rate library."[1]

Hence the basic relationship between trustees and Friends is reciprocally cooperative and supportive--for both groups are dedicated to promoting and improving library services.

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[1] Mathews, Anne J. "Library Friends and Regional Library Networks," in Organizing the Library's Support: Donors, Volunteers, Friends. Krummel, D. W. ed. Univ. of Illinois, 1980. p. 42. (Allerton Park Institute. No. 25.)

The relationship between trustees and Friends (and members of both groups to the library) is affected by their unique reasons for being, and needs to be understood by each.

Trustees serve the library officially in an administrative or advisory capacity, as an appointed or elected board, and are legally liable for the results of their decisions and actions. They are also restricted to performing only along lines that are clearly marked. The Friends, being volunteer organizations, are neither required to perform any particular function, nor limited in the scope of what energy, imagination, and innovation may inspire. Tensions may develop if there is lack of mutual understanding of these differing roles. Trustees may be wary of the Friends' "hands on" activities and see the Friends as infringing their territorial imperative; while the Friends, not aware of the restrictions imposed on library boards, may resent the trustees' apparent inaction or procrastination. Such misunderstandings disappear when trustees and Friends know and appreciate each other.

Friends groups are separate, independent organizations with their own officers and organizational structures. Today, many are nonprofit corporations. While trustees often help establish a Friends group, they usually do not serve as officers because their legal obligations could result in conflict of interest.

Library boards frequently have one member, however, who serves as formal liaison with Friends groups, and vice-versa--a most useful practice. Frequent communication among trustees, Friends, and the library director further improves library service.

Visibility and appreciation of Friends' activities have increased considerably with the reduction of library funds following Proposition 13 passage.

Library boards recognize Friends groups through letters to officials, certificates of appreciation, press releases, and in special programs honoring individuals for contributions to the library. Such recognition is small recompense for the time and effort expended, but at least this permits Friends to know they are appreciated, applauded, and that their continued and invaluable support is needed constantly.

With Volunteers

With volunteers, the library gets a chance to be truly responsive to the community it endeavors to serve. Don't forget, library boards, appointed or elected, are volunteers. They are unpaid members of the library organization, despite their heavy responsibilities. Friends of Libraries, again a volunteer group, come to the rescue of libraries time and time again as a result of their activities and representation of community needs and interests. With Proposition 13 affecting library finances so adversely, other volunteers from the community, besides the Friends, have offered help to libraries. Today, they are assuming some duties in libraries where staff is reduced, and perform many tasks which otherwise would be added to remaining staff schedules, or cut out completely for the public. One or two hours per volunteer, per week, over an extended period represents "X" number of hours added to public service.

To involve the spirit of volunteerism which exists in all communities is a very positive step to take. However, any consideration of a program using volunteers needs first to be very carefully discussed and planned for with both library director and staff. This ensures all are clear on the objectives, how the program can help the staff, how it can benefit library service, and how community contacts can be expanded. Volunteers should not supplant activities and functions of especially trained employees, but their assistance accomplishes

many important and vital supplementary tasks for liibraries. Planning and the orientation of current staff, as well as of the volunteers, means successful partnership of all.

At the same time, it is equally important that volunteers, whether in the role of Friends or in the role of library volunteers, be accorded the same concern and consideration provided regular staff members. This means orientation, training, supervision, evaluation, and expression of appreciation for jobs so well and generously done.

With Other Library Advisory Groups

From time to time libraries may be fortunate recipients of a special project grant which mandates an advisory group for the grant program to assist with community liaison and evaluation. (Example: an outreach community program funded by a Library Services and Construction Act grant.) It is the close and ongoing communication between trustees and this advisory group which will reap the benefits for which such advisory groups are designed. Communication, of course, does not just happen. It has to be planned for by the board and the library advisory committee. Reciprocal representatives who meet regularly and report to each board can keep open communication links and determine if the program is going along successfully, and if it is to be supported or not supported as an ongoing program by the recipients and the taxpayers after the grant funds are concluded. This is information trustees must know to make decisions on next year's library budget, to determine program priorities, and to plan for next year's library programs which will work.

Another exciting advisory board just beginning to take shape in California is the system advisory board (SAB). This, too, is a citizens advisory board mandated by state legislation, the California Library Services Act (CLSA).

These are advisory boards to each of the 16 "library systems"[1] in which almost every public library in California is a member. Each SAB is designed to be representative of the total community served by its system. What these advisory boards do, how they can be of most assistance to system executive councils, to local library boards, and to local governing agencies is what is currently being worked out. In December 1979, at the annual California Library Association meeting in San Francisco, the system advisory boards were invited to join the California Association of Library Trustees and Commissioners (CALTAC) as a means of strengthening the bonds and voices of concerned citizens for the welfare and well-being of local libraries and library service to every Californian. In other words, the larger the number of trustees, Friends, and other advisory groups who speak jointly for libraries, the better government and taxpayers will hear and respond.

[1] San Francisco Public Library, representing the last single public library system in California is in the process of joining BALIS. See pp. 41-43 for more on "systems," and p. 81 for map of "systems."

VI. SPECIAL CHALLENGES FOR BOARD MEMBERS

Selecting A Library Director

Selecting a library director is one of the most important duties and activities in which a public library trustee participates. It is a sensitive process. Today, government agencies must be particularly aware of equal employment opportunity and affirmative action provisions; and most public servants, such as librarians, are included in the local civil service structure.

Specific procedures for selecting a library director will vary, and probably will be set by a city or county personnel director, manager, or elected officials.

Administrative boards usually have an accepted role in this; the degree of their involvement may or may not be spelled out in writing. Special library district administrative boards have the power to act unilaterally, and do select and employ the library director. Advisory boards on the other hand, usually have no specified role; however, they often can make recommendations, which because of their expertise and experience are especially useful and needed.

All trustees, whether administrative or advisory, have a clear responsibility to be involved--probably via the political relationship which they have with elected officials--in the process of selecting a library director. Trustees are uniquely acquainted with the library, they know its needs, and they have the freedom to remind officials that questions other than a candidate's experience and salary expectations affect the library.

For both administrative and advisory library boards, a change in top management offers a perfect opportunity for trustees to consider basic questions about the library and perhaps redefine its operation. For instance: what is,

and what should be the role of the library in the community? Has the community changed and has the library reflected these changes? Can we describe the type of library that will best serve the community? What sort of library director will help achieve these goals?

These questions should be answered in writing, after discussions among trustees, interested elected officials and their staff, and perhaps selected community representatives. Findings may show that a change or direction is desirable.

Trustees usually prepare or collaborate with the Personnel Department in preparing a job description for a library director, or revise one already on file with the Personnel Department. This job description will reflect the answer to "What sort of director is needed?" by containing a description of the job itself and listing of the minimum requirements/qualifications desired. The job description is often also the basis for the preparation of the official "Job Opening Announcement" usually prepared by the City or County Personnel Director, or Administrator.

How widely and intensively to recruit for a library director is a decision that trustees will make, recommend, or influence (according to whether they are administrative or advisory boards), after deciding on the desired direction of their library and, thus, on the type of individual who is needed.

Some governmental agencies require that all new openings be posted internally before being made public, and that qualified employees be encouraged to apply for promotion. While promotion from within is to be encouraged, a breath of outside expertise is also desirable. Trustees are aware that a national surplus of experienced, well trained librarians exist today and wide distribution of job opening notices to professional journals such as

American Libraries and Library Journal, to library schools, and to professional associations such as California Library Association (which operates a telephone job line) may bring applications from exceptionally qualified individuals.

While wide recruitment may be time consuming, and even difficult at times, individuals who bring innovative ideas and points of view to a public library may give remarkable service to a community. Trustees have a responsibility to their communities and their libraries to search for the best library director available.

One of the most desirable methods of final selection is for a formal board composed of librarians from other areas, and lay persons (including a trustee representative) to do the final interviewing and make strong recommendations to appointing officials.

Criteria to be considered in the selection of the library director may be divided into at least three categories: personal characteristics, experience (including business administration), and education. These categories might be grouped into an informal checklist (see Appendix, p. 51 "Criteria for Library Director Selection"), for use in assessing interviews, experience, records, and references.

Remember that the person you help select is the one who will run the library for many years, not you, and he or she needs that rare combination of confidence, friendliness, self discipline, leadership aiblity, and vision that will make your library the best in the state--with your help of course.

Buildings--New or Remodeled

Sooner or later (preferably sooner considering the rapid expansion of information in the computer/satellite age), trustees face the necessity of providing additional library space. Building! One can sometimes duck the issue and leave it for the next library board, but it cannot be avoided

forever. The California Education Code says unequivocally that the administrative trustees are responsible. Indeed, trustees can even act independently of the governing agency to which they report in starting a building project, although such drastic action is not ordinarily necessary.

Of all trustee duties, building a new library, or expanding, or remodeling, requires the most intense deliberations, planning, and checking. It takes time at every step. Not only are trustees spending a great deal of public money, they are also creating an institution, whose service and value is projected far into the future.

Reasons for building vary: lack of space, demographic changes in your community, antiquated structures, condemnation. A decision to build usually lags behind the need. Once the trustees agree on the necessity of a new building, planning becomes the primary consideration. Begin by visiting all the recently-built libraries in your area, and as many others as possible. Compare these structures with what you visualize as your new building in terms of location, size, use of space, and community programs. Talk to library staffs as well as administrators about the structures. Learn the good features as well as the negative ones. Use your own library resources as well--articles and photographs on library construction from professional literature, and materials from your cooperative library system, State Library, or local architect. The trustees may seek professional assistance to determine what library services the community will require within a specific time range (usually 20 years ahead). When the study is completed, the trustees will weigh all factors--both known and suspected--before deciding "if" and "when." The study, plus frequently updated statistics and amendments to reflect changing conditions will serve as a guide for planning at each step of the building process.

Ideally, a study of future library needs will include a recommendation for locating the new building, easily the most important part of the process. If not, trustees choose the site and recommend their choice to the governing agency which is responsible for financing and construction. Check with the State Library for written guidelines to assist, ones hammered out through experience. Maximum accessibility is the goal: this frequently means that the proposed library site, where the most people are or are likely to be, will be expensive. In these times of ever-increasing land values, locating the building on a quiet side street, in a peaceful park, or in a civic center where offices close at 5 p.m. is tempting, because the land is cheap or already owned by the governing agency. Don't be tempted! You'll get only what you pay for. If those who control the purse strings disagree with your choice of site, be prepared to defend it with the recommendations of your study, circulation figures of your present inadequate library and others of a similar size, and opinions of professionals in library science. If your arguments fail, be prepared with a second choice of site that you can live with, although perhaps not so happily.

Financing the new library may take any or all of several forms, depending on the kind of library. Although the library board may act as the bonding agency in some cases, raising the money more often involves the trustees with the governing agency. If you are searching for building funds, ask the State Library for late information about innovative methods for funding which have been used by communities in California. Boards may also consider applying for grants such as "Community Development Block Grants," for revenue-sharing funds, or for some type of leasing arrangement in conjunction with city or county governing agencies or departments. In this present period of diminishing

taxes, no avenue of grants, private foundation, or governmental assistance should be left unexplored.

During each phase of a building project, trustees must keep the public informed. Publicize the need for a new library; the decision to study the situation; the results of the study; and especially the recommendations. Involve the community in decision-making at every opportunity. Ask where the new library should be located; determine what new services should be added before the building is a reality.[1] If a bond issue is necessary to raise the building funds, miss no chance to speak out on the need for expansion and the greater level of services that will be offered. Maintain a bureau of speakers sufficient to appear before any group or audience whose approval and support will help your cause. Nor can you stop when the bond issue passes. Keep up your public's interest as high as your own as you get on with the job of building, and don't forget to say "thank you" when it's finished.

"Measure twice; saw once!" The old carpenter's advice applies to building a new library long before the first plank is cut. Planning is the key and includes a written building program. While libraries aren't exactly rare, they do happen less frequently than new office buildings, condos, or mobile home parks; which means that architects and contractors have less experience in creating them. Nor is the average trustee or chief librarian likely to be a veteran in the field. Therefore, a written building program is a necessity, and an on-the-job consultant can help even more. The program should be written by a library building consultant hired for the purpose. This may seem like an unnecessary expense, but the value of a written program is far greater than its cost.

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[1] Examples: Community room with separate public access; access for the handicapped; electronics services equipment.

Choosing an architect may be either a trustee function, or one shared with the governing agency. Either way, the trustees should be prepared. Appoint a building committee from the board charged with evaluating libraries that have been built recently in the area; study the work of architects who have designed libraries and decide in general the kind of building the trustees feel is suitable for the chosen location. In this way the library board can speak with authority on the selection of architect and design. And always, keep the public continually aware of your progress!

Trustee responsibilities in construction and furnishing phases realistically pass to contractors and a library building consultant, but the library board must always be in touch with the building project coordinator and be available for consultation and advice. Since the trustees approve payment at every step of the project, this contact is especially wise.

If the library board conscientiously performs the duties related to a building project, a new library will rise and a new era in library services begin. Trustee responsibilities do not stop then, however. Having sold the public on these services, make certain they are used sufficiently to justify the money and effort expended. Post signs on city streets or county roads pointing the way to the library, and identify your brave, new building with a large sign. And don't be modest. Point with pride! (Although you may have as much trouble getting approval for signs as building the library!) Publicize your added services, emphasize accommodations for the handicapped--ramps and elevators--which you will have because they're required by law. Then sponsor any project you can relate to library services from strawberry festivals to animal parades to book fairs which will attract library users. If your new building is full of people, you'll know you're doing a good job.

Trustees may choose to expand library services through a project of remodeling and/or enlarging the existing library structure. The reasons for such a decision range from earmarked gifts or endowments, to historic preservation and sentimental considerations to the absolute necessity of having to use what is already in place. Remodeling is usually more expensive than new construction and requires particularly careful planning and expert professional advice. Library services are usually disrupted during such a project, which means that the public has to be informed well in advance of any change and reassured constantly.

The role of the library consultant has been stressed throughout this discussion. Libraries have been and can be built without the help of a professional library building consultant. Chief librarians, trustees, or gifted library users usually provide the consulting expertise in those cases. Almost all who have been involved in recent building projects agree, however, that those boards who use professional help are less likely to develop ulcers. Gelusil may be cheaper than a consultant initially, but is has to be continued over a much longer period.

VII. THE OUTER LIBRARY WORLD

Trustee Organizations

A library trustee interested in doing an effective job, quickly becomes familiar with the "outer world" of library services and activities, beyond the local library boundaries of city, county, or special district.

Librarians, like most professionals, have organizations, both state and national, designed to set and maintain standards and to provide a structured framework for communicating with each other, with the public, and with elected officials.

Within these organizations are groups designed especially for trustees. By participating, trustees are able to cooperate with their counterparts from other areas, and in so doing become familiar with common problems and solutions and improve their knowledge of library concerns on all governmental levels.

Trustees often are hesitant about memberships in professional groups dominated by librarians. Yet one of the greatest values of membership in a trustees' association is the interchange between librarians and trustees, with mutual respect engendered by the contributions and collaborative efforts of each.

The national library association is the Americal Library Association (ALA). One of the many "divisions" of ALA is the American Library Trustee Association (ALTA). This is the only national association of library trustees.

Closer home, the California Library Association (CLA) maintains close liaison with ALA. CLA sponsors the statewide California Association of Library Trustees and Commissioners (CALTAC), which is one of the CLA "chapter" organizations. The CALTAC board meets quarterly at different libraries throughout the state. Its annual meeting in December is held at the same time and place, and as part of, the annual California Library Association meeting.

Watch for announcements of, and ask your librarian about the frequent one-day workshops, symposia, or other gatherings sponsored by your library system, a regional library administrative group, or the State Library. During the past year you might have been brought up-to-date at one of these on subjects such as, coping with Proposition 13, school library/public library cooperation, or automation and information data bases.

The professional literature is a window, too, which you can and need to use for a look at state and national library developments. There's a checklist of recommended references in the Appendix.

California Public Library Systems and Networks

Although California library services are among the best (sheer modesty prevents our saying "the" best) in the nation, it is true no community is ever sufficiently affluent to satisfy the library needs of all its citizens. So libraries frequently share their resources on a broader level to benefit their users. In California, this can be accomplished through "system" membership.

Libraries geographically close have formed "systems" to share their materials and staff expertise. Expensive books, periodicals, films, and other materials can be exchanged via interlibrary loan (ILL). Services such as children's programs, books for the homebound, or answers to sophisticated reference questions, often not affordable by an individual library, are possible through these groups.

There are 15 multi-jurisdictional cooperative systems operating in California today, and one single system.[1] Most public libraries in California belong to a cooperative library system.

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[1] See map of systems in Appendix, p. 81.

System membership affords an opportunity for you and your library administrator to share ideas and new techniques by working together cooperatively with other libraries, to see and hear what other new ideas and services are fermenting, and even occasionally to achieve economies your local governing authority will thank you for. When "systems" first started, it was realized actual economies were infrequent, but on the other hand, the depth and breadth of service available to the public increased enormously. Now cooperative system automation projects may just result in economies also. Keep abreast of these.

Library directors participate in their local system's "Administrative Council," (a library system's administrative body). Local trustees are encouraged to attend system meetings and special informational meetings. Each library system also has a citizens' advisory board, and local trustees sometimes serve on these. These boards are known by the acronymn, "SAB" (System Advisory Board). Their function is parallel to local boards of trustees--they are a liaison to the community for the system, rather than for the individual public library.

Cooperative help at another level comes from library "networks": groups of specialized libraries--schools, institutions, or governmental agencies which join a public library "system." Their resources can be indirectly tapped by even the smallest of community libraries who belong to the system, typically by means of interlibrary loan of materials--an enormous benefit to those who can use and profit from university collections or collections of special libraries not normally available to the public.

Funding for Library Systems and Networks

Funding for cooperative library systems and networks is derived from both federal and state sources. Originally, the first system was financed

through federal library demonstrations funds--Library Services and Construction Act (LSCA)--awarded through the California State Library. Then came state funding through the Public Library Services Act (PLSA) of 1963, which provided a formula of financial support for cooperative and single systems of libraries in California.

PLSA was superseded in 1977 by the California Library Services Act (CLSA), whose purpose is to make possible the sharing of library resources among libraries, to serve the underserved, and to supplement, not supplant, local funds.

Today, a combination of state and federal dollars from LSCA and CLSA, and occasionally local funds, subsidize these systems and networks for the benefit of local library users.

These CLSA state funds currently are used for the support of the California Data Base, reimbursement to libraries for interlibrary loan and direct loan programs, cooperative system reference referral, system communications and delivery service, system advisory boards, and consolidations and affiliations (i.e., libraries joining a system, or two libraries or two systems joining together). CLSA is administered by the California Library Services Board and the California State Librarian serves as Executive Director to the Board.

California State Library

A special top level resource for all California libraries is in Sacramento, the California State Library: "library to the Legislature," and "libraries' library."[1]

Trustees will find the Library Development Services Bureau of the California State Library of great assistance. This Bureau collects and publishes

[1]Held, The Rise of The Public Library. p. 144.

library statistics and provides a clearinghouse of library information. It also offers special consultant help to library trustees, library administrators and staff, to local government officials, Friends, and others interested in improving public library service. Publications of the Bureau of particular interest to trustees are the annual "Library Trustees and Commissioners State Directory," a listing of all California public library trustees and commissioners and SAB members; and especially the annual "California Library Statistics and Directory," to give you comparison figures of services supplied to your local community with those of your neighbor, and others statewide.

In addition, this Bureau administers federal funds for public libraries (Library Services and Construction Act grants--LSCA grants) and state funds for California library systems and network programs (California Library Services Act).

A special service of the State Library used heavily by all Californians is that of the Books for the Blind and Physically Handicapped. This regional center, a branch of the State Library, is located at 600 Broadway, Sacramento, and supplies braille and talking book recordings from the Library of Congress to its many clients.

The State Library's outstanding collections in genealogy (through the Sutro Branch in San Francisco), in government publications, business, technology, law, and California materials, are available through interlibrary loan to other California libraries, large or small.

State and National Picture

Keep abreast of library legislation: local, state, and federal. Your views and voice are essential in this. In 1979, trustees followed SB 958 in the California State Legislature which proposed a per capita support

for public libraries based on a formula for local and state funding. This legislation was vetoed September 1980, but library supporters plan to try again to obtain similar legislation in the coming year.

Federally, the National Library Act, S. 11241, introduced in 1979 by Senator Javits and Senator Kennedy, builds upon and is expected to replace the Library Services and Construction Act (LSCA), which has supplied funding for many California libraries since 1957, and is due to expire in 1982. The complete text of the proposed new legislation appears in the Congressional Record for June 20, 1980, and its major sections are:

Title I. Interlibrary cooperation and network support
II. Public library services
III. Public library construction
IV. Public library programs to meet special user needs
V. Planning and development.

Check with your librarian about the current status of this proposed act and other important library legislative measures, particularly as we must start again with a new Congress. Forward your own thoughts and input to the legislation drafters. Your ideas are needed.

Another important national development is the activity arising from a long-sought method of evaluation of public library services. Library boards, library staffs, and governing agencies across the country have sought diligently over the years for "standards" by which to measure local library performance. How well should local libraries be supported financially to provide the necessities of library service: materials, staff, space, programs, would be another use for "standards."

Responding to this need, the national organization, ALA, provided such standards (in 1943, 1956, and 1966)--first for the individual library itself, and then for "library systems." The realization has now come that one uniform

set of standards cannot be valid or usable for all public libraries, large and small, urban and rural, in their mission of supplying today's information needs and preserving the "record of human thought." Today we feel a library's services and budget should fit the needs of the individual community it serves. This determination culminated in the Mission Statement,[1] published by ALA in 1979, and then in the important publication, A Planning Process for Public Libraries,[2] a program emphasizing community analysis and long-range planning. As a result, exciting activities are taking place as library boards and library staff test these new concepts of evaluation and program priorities focused not on a generalized rational norm, but on the needs of the individual local community.

The world beyond local bookstacks is almost limitless. The first-ever White House Library Conference, held in late 1979, indicates the concern felt at the highest government level. The participants from every state were interested citizens like yourself, with librarians in a minority. Everyone with an interest in libraries--municipal, county, district, academic, industrial, private, systems, and networks--had a voice in the agenda. In our state, delegates selected at local and regional preconference caucuses met in a California Governor's Conference in Sacramento, from which delegates were chosen to represent us in Washington at the National White House Conference. Three of the delegates and an alternate were library trustees.

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[1] ALA. Goals, Guidelines, and Standards Committee, Public Library Association. The Public Library Mission Statement and Its Imperatives for Service. Chicago, American Library Association, 1979. (Interim guidelines which led to 1980 publication, "A Planning Process . . . .")

[2] Palmour, Vernon E., Bellassai, Marcia C., and DeWath, Nancy V., A Planning Process for Public Libraries. Prepared for the Public Library Association, a division of the American Library Association. Chicago, American Library Association, 1980.

Talk at the White House conference ran to basics such as financing libraries, making them more responsive to community needs, and getting the word to the public about the services offered. The most provocative discussions concerned serving the unserved, advances in technology, the new-newer-newest electronic and computerized tools we now use, and the "watch out for tomorrow" ideas that will relegate today's systems to a spot alongside Babylonian clay tablets. These things are coming, minus a few discarded along the development trail, and library trustees, directors, and staffs had better be ready to go with the flow.

Treasure your own library but get into the outer library world as well. Take every opportunity to restock your basic trustee kit. Man's first tools were crude, but they enabled him to change the world for his descendants. You can do no less for your patrons although you may feel at first glance that learning the arcane language and techniques of computerization makes flint chipping seem easy.

Interface anyone?